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13 MAR 1976

MEMORANDUM FOR: Deputy Director for Administration

FROM : [REDACTED]
Acting Director of Personnel

SUBJECT : Fitness Report Evaluation

REFERENCES : (a) Memo for DCI fr DD/A dtd 1 Mar 76, subj:
Employee Concerns About Fitness Report
Evaluations
(b) Memo for DCI fr MAG dtd 23 Feb 76, subj:
same as ref (a)

1. The referenced Management Advisory Group memorandum is further evidence of a ground swell of concern relating to the evaluations on Fitness Reports. The Annual Personnel Plan statistical report of the rating curve for FY 75, and the former Director's reaction to the excessively high rate of Strong evaluations, also served to focus attention on the use of the Fitness Report in the Agency. We question whether the Task Force is the most efficient approach to provide guidance in the use of the Fitness Report system. If there was evidence of a need to review the philosophy and implementation of fitness report systems per se, the formal group might be an appropriate way of obtaining a study. We are in agreement, however, with the thrust of the MAG memorandum that the existing Agency system is valid, and it is the understanding and the implementation of that system that must be improved. We do not believe a Task Force would be an effective way to solving that problem.

2. We recommend consideration of another approach to bring the attention of employees and managers to the evaluation process inherent in the Fitness Report system. OP/P&C has just completed drafting revised instructions for the preparation of the Fitness Report. We propose a Headquarters Notice, using the revised instructions as an attachment, which would discuss the philosophy of the evaluation system, the responsibility of the rating and reviewing officers to the individual employees as well as to the Career Service and to the Agency, and the responsibility of the employee to insure the evaluation system is properly used in his or her Fitness Report. The report format which provides for employee input, if desired, is relatively new and still not completely understood and more guidance may be appropriate.

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3. The Deputy Directors as Heads of the Career Services are responsible for establishing the basic criteria for the evaluation system in their respective Services. The Notice would make note of this fact and, with Management Committee approval, would include a statement that each Career Service, or where appropriate, Career Sub-group, has or would be issuing specific guidances of instructions applicable to the individual standards and requirements of the Service or Sub-group. Over a period of time several Services and Offices have published material on this subject. DDO is now requiring that specific grade precepts be applied in the preparation of Fitness Reports, and has issued a recent memorandum in response to the information perceived from the APP statistics on the subject. The Office of Personnel is also issuing an OPM to provide detailed guidances for the preparation of Fitness Reports on OP personnel.

4. In the area of training, we believe more coverage of this important process can be incorporated in OTR courses, particularly in Management courses. Presently OTR offers a two-day Performance Evaluation Workshop on the request of interested offices. We believe this type of training is an essential beginning step and at a minimum should be required for all new supervisors. We recommend that consideration be given to include in all Management courses a specific segment of the training devoted to the philosophy of the evaluation system in the Agency, the standards which are common to the system as a whole, and the responsibilities of the various persons concerned in the preparation of the FR . . . the employee, the rating officer and the reviewing official. Such training must also incorporate the concept that the evaluation system is of major interest to the supervisor and to management and the standards of the two must be integrated in a meaningful fashion if the Panel and Board system of personnel management is to be effective.

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